TECHNICAL EXHIBIT 3-004

ITAMS SERVICE AND PROBLEM MANAGEMENT QUICK REFERENCE GUIDE

See attached guide.

Logging In & Taking a Call

Each user of ITAMS has been assigned certain access privileges according to the function (s) that are to be performed. The privileges for each user are set in the Operator Profile.

When you access ServiceCenter®, a Login screen prompts you to enter your user name and password. The login is *case sensitive* and all entries must be made in lower case.

1. Type your user name in the **NAME** field, then tap **<Tab>** to select the **Password** field.
2. Enter your password in the **Password** field, then **<Click> OK** or tap the **<Enter>** key.

Service Center now opens to the Home Menu. All Service Center activities start with **"Take New Calls"** which may or may not result in a **Problem Management Ticket.** To take a new call, click on the **<Take New Calls>** button.

You may also want to check the call tickets this user has opened. To do this click on the **"Call Queue"** button.

Queries

To look for existing call records a search or **Query-by-Example (QBE)** can be performed. The quickest way to execute a QBE is by viewing the particular "INBOX" that contains the tickets you would like to view. The Inboxes are lists of calls or problem tickets that can be viewed according to a variety of choices. Click on the Call Queue or the Problem Queue button in the main menu. From the list screen that appears, click on the Switch Inbox Button at the top of the screen and select the desired choice from the drop down menu. Another way to look for tickets is to click on the **Search PM tickets** button or the **Search Call** button. Enter your search criteria in the form that appears and hit Enter or click on <search>. The database is examined for tickets that match the search criteria entered - data entered in fields - in the ticket screen.

The end result of a search is either one of three (3) possibilities:

1. The search has found multiple records for the criteria provided and displays a QBE List;
2. A single record is found, in which case the form is populated with all of the information in the database; or,
3. No records are found, in which case a pop-up message is displayed stating that no records were found.

Taking a New Call

A **Call ticket** is created by entering the appropriate data in at least the required fields (as with the entry of information into any form, as much information as possible should be entered into the Call ticket Form). Required fields are those that have red text and a small red triangle in the upper left corner of the field. Data to be entered includes: **Incident Start Time, Method Reported, Notify By, Reported By**, **Contact**, **Problem Site ID, Description, Category, Sub-Category, Priority**, **Project, Asset ID,** and **Call Resolution** (if closing a call)**.** Use **<Find>** and **<Fill>** features to populate fields, where available.

After all information is entered in the required fields, the following actions may be taken:

Create Problem – This allows a problem ticket to be opened, associated with the call ticket, and assigned to a Service Provider.

Q-Open or tap **<F2>** - Creates a Call ticket and saves the information.

Clone - Copies the existing Call ticket and increments the Call ID by one number.

Close – Allows you to enter the problem resolution and close the Call ticket. This is used when the helpdesk assistor resolves the problem over the phone.

Create a Related Problem Ticket

All Problem Tickets will be created from a Call ticket (except SAT tickets). A Problem Ticket is opened from and associated with the current Call ticket. With the Call ticket displayed, click on **Options** from the menu bar, or use the **Create Problem** button. Select **Create a Problem Ticket** and complete all required fields. **Save**.

Associate a Call ticket with an Existing Problem Ticket

Before associating a Call ticket with a Problem Ticket, open the Problem Ticket that you want to associate and make a note of the ticket or ticket's ID number.

1. Access a **Call ticket.**
2. Select **Options ->Associate to Problem.**
   A dialog box displays asking:
   Associate Call xxxxxx with which Problem?
3. Enter the ID number for the Problem Ticket
   NOTE: You must enter a correct number. Entering a partial number *does NOT* access a QBE list.
4. Click the **OK** button. A confirmation appears in the status bar.
5. Update the problem ticket(s) to reflect the association.

Searching for Problem Tickets

You may search for Problem Tickets by doing either a **Basic** or **Advanced Search**. To execute a search from the **Problem Management Inbox**, **Click** on the **Search PM Tickets**. A window opens with several tabs, which include:

Basic Search – Several selections are presented. Any or all of the fields can be left blank. Wildcards cannot be used.

Category Specific Info – Several more different fields/selections can be made. Any or all of the fields can be left blank. Wildcards cannot be used.

DT – Use this area to search for downtime reported (formerly UMR).

Date/Time Search – For use in queries using dates as parameters.

IR Query Search - a blank text box is displayed where you can enter a plain text query.

Updating a Problem Ticket

Each time you take an action in problem diagnosis and resolution, the problem ticket *must* be updated:

1. Query for the ticket you desire (see Queries).
2. Modify any fields that require updating in the **Problem Details** tab.
3. Access the **Actions/Resolutions** tab. Enter any new information about the problem under **Update/Resolution** tab**.**
4. When all updating has been done, click on the **Save** button or tap the **<F2 Save>** key.

Options - Existing Problem Tickets

The existing Problem Ticket form **Options** menu contains a set of options as follows: (SUBJECT TO CHANGE!)

1. **Set Reminder –** Currently not in use.
2. **Print Record** - Prints the Problem Ticket.
3. **Clone** - Copies the Problem Ticket and places the data in a new ticket.
4. **Notify** - Allows you to send a message containing the data in the Problem Ticket.
5. **Page List** - For tickets that have multiple pages, displays a QBE list from which you can select the page you want to display.
6. **Find Solution** – Currently not in use.
7. **Associate to Call** - Allows you to associate the problem ticket to an existing call.
8. **Associate to Problem** – Allows you to associate the problem ticket to an existing problem ticket.
9. **Change Category** - Allows you to change the Category of this ticket.
10. **P&R Guide** – Accesses the Probe and Response Guide.
11. **Add/Edit Contact -** Accesses the Contact Information form and allows you to edit Contact Information or add a new contact.
12. **View Related SM Calls** - Allows you to open a call ticket that will be associated with this problem ticket.
13. **Open Related SM Calls -** Allows you to open a Change Management change that will be associated with this problem ticket.
14. **View Related Problems** - Allows you to view problem tickets that are associated with this problem ticket.
15. **Open Related Problems** - Allows you to open a new Problem ticket that will be associated with the existing ticket.
16. **PM Notes** – Free form text area for adding notes.

Closing a Problem Ticket

(Note: When a problem is resolved, the ticket can be closed. The HELPDESK and other designated personnel will be responsible for closing problem tickets)

1. Query for the ticket you need (see Queries).
2. **Click** on the **Close** button or tap **<F6>** key**.** The **problem close** form is displayed.
3. Access the **Update/Resolutions** tab.
4. Enter all required fields (**Cause Code, Resolution Code**, **Incident Stop Time,** and **Resolution.**
5. Click on the **Save** button or tap **<F2>**. If calls are associated with the problem, those calls will be closed by the system and an email will be sent out to the customer.

Reviewing Open Tickets

1. From the **Main Menu** click on the **Problem Queue Button**

2. *While in the* ***Problem List click on the*** **Switch Inbox** button ***(to select from a drop down list of saved queries),*** **Problem by Owner** ***(choose from a drop down list of users),*** *or* **By Assignment Group** (choose from a drop down list of groups). If Switch Inbox is chosen some of the possibilities include All Problems, High Priority Tickets, New Inbox, Open Tickets Assigned to Me, Open Tickets I own, hot problems, problems I reported.
3. Sort the list by double clicking on the column header of your choice. From the QBE list that is displayed double click on the problem to view the ticket**.**

Problem Management Mail

RECEIVING MAIL

1. **From the *PROBLEM MANAGEMENT SCREEN click on the Service Center mail icon.***

2. **From the *MAIL MENU Screen click on Read Mail***

3. **Select Type of Mail.**

4. **If a QBE list of mail is displayed, double click on the *From* field which contains the source of the mail message (usually a login) to display the mail message.**

ACCESSING A PROBLEM TICKET FROM MAIL

1. **From the *PROBLEM MANAGEMENT SCREEN click on the Service Center mail icon.***

2. **From the *MAIL MENU Screen click on Read Mail***

3. **From the *Select Type of Mail* screen, choose HelpDesk.**

4. **If a QBE list of mail is displayed, double click on the message you wish to view.**

5. **Select *Call PM* to bring up a Search Window or choose the *Call PM Tix* button to go directly to the problem ticket and follow update, resolve etc. procedures.**

6. **When you exit the problem ticket, you will return to problem mail message.**

   (Note: Problem tickets are only accessible in Help Desk mail.)

SENDING MAIL:

1. **From the *PROBLEM MANAGEMENT SCREEN click on the Service Center mail icon.***

2. **From the *MAIL MENU click on Send Mail***

3. **Enter the login(s) of the user in the *To* field or enter the first letter of the first name, press *<F9> - fill*, and select the user from the QBE list.**

4. Enter the Subject and message in the appropriate fields and press *<F1> - send* to send an internal Service Center mail.

SENDING MAIL FROM A PROBLEM TICKET USING Notify

1. **From a problem ticket,** go to ***the Options menu and choose Notify* to bring up the mail screen used to send both SC Mail and external mail.**

2. **Follow the same steps as described under *Sending Mail.***

3. **The Notify mail feature automatically attaches a print of the ticket and fills in the Subject field referencing the problem ticket #.**

Help Desk Questions to Ask:

1. Has the customer been verified from the directory?
2. Identify the problem(s)
   - Is there an error code?
   - Is there an error message(s)?
   - What application was the customer using at the time of the problem?
   - What steps have been taken to determine the error?

3. Identify the impact? (determines the priority) Is the problem affecting others in your area, and if so, how many?
4. When did the problem occur (date and time)?
5. Re-state the final problem description to the customer for concurrence.

For users that have browser software (i.e., Netscape, or Microsoft Explorer) you can access the ITAMS HOME PAGE for up-to-date ITAMS information regarding access methods, documents, schedules, and releases.

ITAMS HOME PAGE
http://netra.nc.no.irs.gov:8080/amm/default.htm

ITAMS

Service and Problem Management

Quick Reference Guide

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